



# **Data Collection System User Guide**

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Community Resource  
Coordination Groups (CRCGs) of  
Texas

Updated August 2023

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## Introduction

### Overview of Community Resource Coordination Groups (CRCGs)

Community Resource Coordination Groups (CRCGs) are county-based interagency staffing groups comprised of public and private agencies that partner with children, families, and adults with complex, multi-agency needs, whose needs cannot be met by a single agency and require interagency collaboration.

The CRCG mission is to provide a mechanism that enables local public and private agencies, organizations, and community members to work together in collaboration to meet the needs of persons which no one agency can meet.

The CRCG model is guided by the system of care values, utilizes a person-centered planning process, and serves as a conduit to inform local and state systems of gaps and barriers in order to find innovative and creative solutions to achieve positive outcomes for vulnerable populations. The [CRCG Memorandum of Understanding \(MOU\)](#) signifies a commitment by eight state agencies to support CRCG efforts at a local and state level. The state CRCG support office is housed in the Texas Health and Human Services Commission (HHSC) Office of Mental Health Coordination.

### Purpose of Data Collection System User Guide

The purpose of this guide is to provide simple, clear instructions on how to collect and report data, as well as highlight how the data can be utilized to help achieve the CRCG mission. The guide is broken down into sections that provide step-by-step instructions and screenshots, including appendices to provide tools to aid data collection and technical support instructions.

The CRCG data tracking worksheet (see Appendix A) will make data collection easier. The tracking worksheet allows you to collect data points at each CRCG staffing, compiling the results throughout the month. When entering data in the system at the end of month, the tracking sheet will ensure all staffing information for that month is in one place and is quick and easy to access. The data can simply be transferred from the tracking worksheet into the data system.

A quick guide (see Appendix C) is also provided for users who need a brief reference guide. Once users become familiar with the system, the quick guide will provide simple cues to work through the data collection system.

The State CRCG Office's goal is to support local CRCG efforts of identifying and coordinating services and supports in the least restrictive environment for persons of all ages with complex needs. The data collected will help tell the CRCG story, highlighting community needs and access to services locally and statewide.

Therefore, data entry is crucial to telling an accurate story, and the data guide should assist users in making data entry as easy as possible.

## The Benefits of Data

Data is defined as pieces of information, as well as facts and statistics collected together for reference or analysis. Data points are information that can be measured, collected, reported, and are used as a concrete method to stay on top of trends and make informed decisions. The CRCG data collection system gathers important information that can be utilized locally and statewide to inform systems and practices and generate funding opportunities. Therefore, consistent data entry from all CRCGs, as well as responses from the satisfaction surveys, are crucial to tell the story of the CRCG process and the impact CRCGs have in their communities and in Texas.

The State CRCG Office supports local community efforts to identify and coordinate services and supports in the least restrictive environment for persons of all ages with complex needs. The data entered by local CRCGs, and satisfaction survey responses from participants and families, tell the CRCG story. This information can influence policy and funding decisions. The accomplishments can be celebrated, and the gaps can be identified and addressed. By reducing duplication and creating more efficient processes and funding streams, CRCGs can continue to achieve positive individual and community outcomes.

The State CRCG Office uses this information to create the biennial legislative report, demonstrating the effectiveness of community efforts to coordinate services and supports. The opportunity to document gaps in services and resources in the legislative report provides a platform to effect positive change for all CRCGs.

The State CRCG Office can also utilize the data to target support training and technical assistance efforts. For example, CRCG data and satisfaction surveys may reflect that individuals and families are not being included in staffings or that individualized service plans are not community-based. One potential strategy for the State CRCG Office may be to offer more training to operationalize system of care values and provide technical assistance for CRCGs to improve satisfaction and break down barriers to provide more community-based services and supports.

At the local level, CRCGs can utilize their data to inform the larger community, access funding opportunities, engage in new partnerships, and celebrate successes. For example, the data reports provide a unique and individualized snapshot of each CRCG that can help local communities target efforts to address the needs of their community. The same data may also be used to help explain how a given grant or program would target a gap in services for a specific population.

Ultimately, one of the reasons we all do the work that we do is to make a positive difference for the most vulnerable populations. The biggest benefit of the CRCG data collection system and satisfaction survey is creating various uses of data that will assist us in collectively achieving the most positive outcomes for individuals, families, and the communities touched by CRCGs.



## Glossary of Acronyms and Terms

**Community Resource Coordination Groups (CRCGs):** CRCGs provide a mechanism that enables local public and private agencies, organizations, and community partners to work together in collaboration to meet the needs of persons which no one agency can meet.

**Data Tracking Worksheet:** A worksheet that can be used to collect data/information at each staffing meeting throughout the month to make data entry easier. Results for the month will be tallied over time and will alleviate the user trying to remember or going back through paperwork from each staffing.

**Emergency Staffing:** A meeting that is arranged quickly and may not have followed the typical process due to a crisis situation.

**First Time Staffing:** The first meeting a CRCG has with an individual and their informal support system (e.g., family, caregivers, etc.) to develop an individualized service plan (ISP).

**Follow Up Staffing:** A meeting that occurs where a CRCG will follow up on the progress or result of an individualized service plan (ISP) and/or with the individual and their informal supports (e.g., family, caregivers, etc.).

**Individual Service Plan (ISP):** An agreement for coordination of services developed between the individual and the CRCG. The planning process involves looking at the person's needs and helping them get the services and supports they need. The person, potentially their family and informal supports, and providers and community members work together to develop the plan during the CRCG staffing.

**Memorandum of Understanding (MOU):** A memorandum of understanding is a document that is an agreement between two or more parties, outlining the terms and details of an understanding that includes each parties' requirements and responsibilities. Eight state agencies signed an MOU outlining the implementation of a statewide system of county-based, interagency CRCGs.

**Reintegration Staffing:** The term used when an individual is returning to their community from an institutional setting. For example, a CRCG may meet to develop an individualized service plan for a child who is being discharged from a residential treatment facility.

**Satisfaction Survey:** A short survey for individuals and their informal supports (e.g., family, caregivers, etc.) to complete after they attend a staffing. Survey results will complete the CRCG data story and help improve how CRCGs achieve positive outcomes for the most vulnerable populations in Texas.

**Staffing:** The act or process of coming together for a common purpose. Also referred to as a meeting. The mechanism CRCG members use to come together to collaborate about a person's needs that have not been met by a single agency.

**State Agencies:** The eight state agencies that developed and adopted the memorandum of understanding (MOU) for coordinated services to persons needing multiagency services.

- Texas Department of Criminal Justice (TDCJ) and Texas Correctional Office of Offenders with Medical or Mental Impairments (TCOOMMI)
- Texas Department of Family and Protective Services (DFPS)
- Texas Department of Housing and Community Affairs (TDHCA)
- Texas Department of State Health Services (DSHS)
- Texas Education Agency (TEA)
- Texas Health and Human Services Commission (HHSC)
- Texas Juvenile Justice Department (TJJD)
- Texas Workforce Commission (TWC)

**Quick Guide:** Simple reference sheet for users who are familiar with the data collection system and just need a reminder.

## Getting Started

### Assigning a CRCG Data Reporter

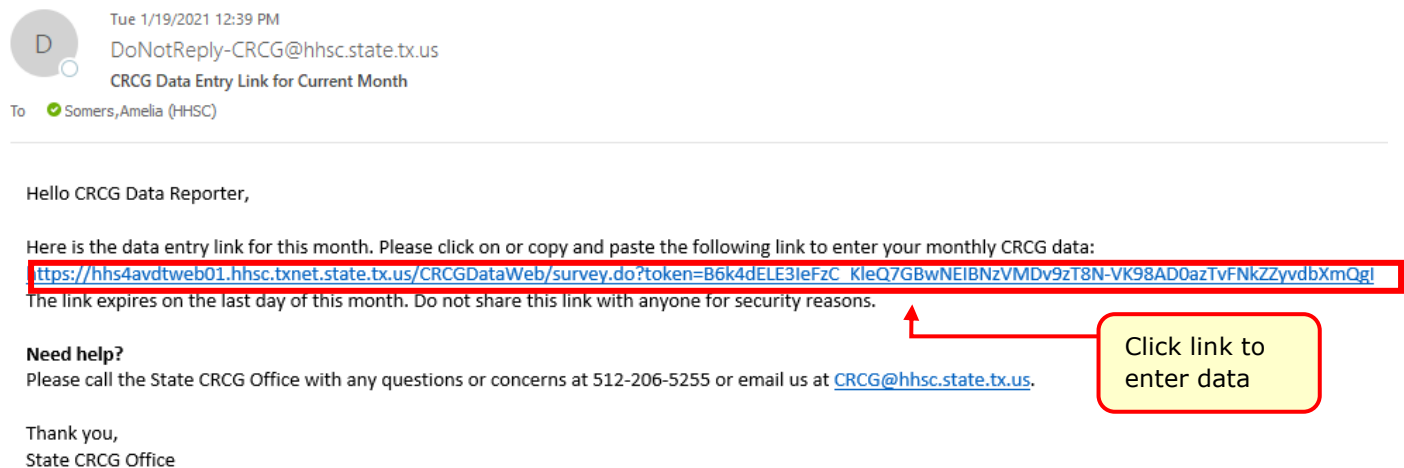
Each CRCG should assign a leader or member to take on the data reporter role. The data reporter is responsible for reporting local meeting data through the data collection system on a monthly basis; and promoting completion of the online satisfaction survey after the individual, youth, or family attends a staffing. Contact the State CRCG Office if your CRCG does not currently have a data reporter or access to the CRCG data system.

### Accessing the CRCG Data Collection System as a New User

CRCG data reporters will receive an automated email at the beginning of each month with a unique link to click on to access the CRCG data collection system (see Screenshot 1). The email will be sent from [DoNotReply-CRCG@hhsc.state.tx.us](mailto:DoNotReply-CRCG@hhsc.state.tx.us). It is important to note that this unique link is only valid until the last day of the current month.

Please note: If you are a data reporter for multiple CRCGs, you will receive one email with one unique link. When you click on the link, you will be redirected to the CRCG data collection system where you will select the specific CRCG office that you want to enter data for in the "Select CRCG" drop-down menu of the Data Entry page.

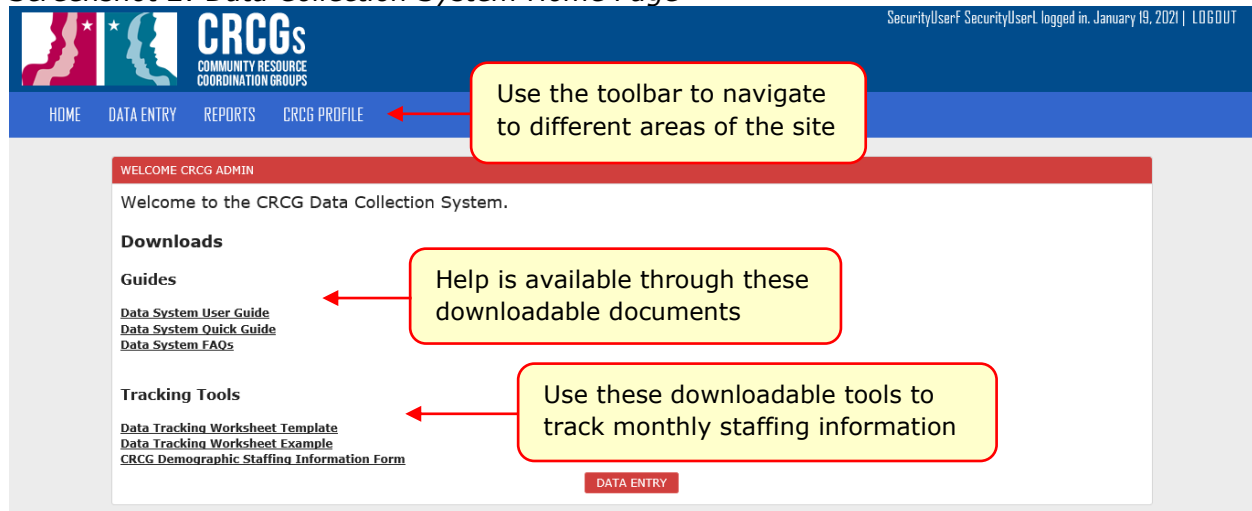
#### Screenshot 1: Monthly CRCG Data Link Email





Once you click on the email link, you will be taken to the CRCG data collection system home page. You will have access to data entry and reports and can download instructions and tools (see Screenshot 2).

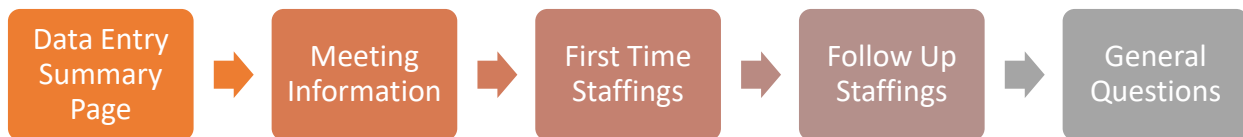
*Screenshot 2: Data Collection System Home Page*



## Entering CRCG Data

### Overview of Data Entry Screens

The data entry component of the data collection system consists of five screens. The following diagram illustrates the sequence of the screens and flow of the data entry process that is described in detail in the next sections.

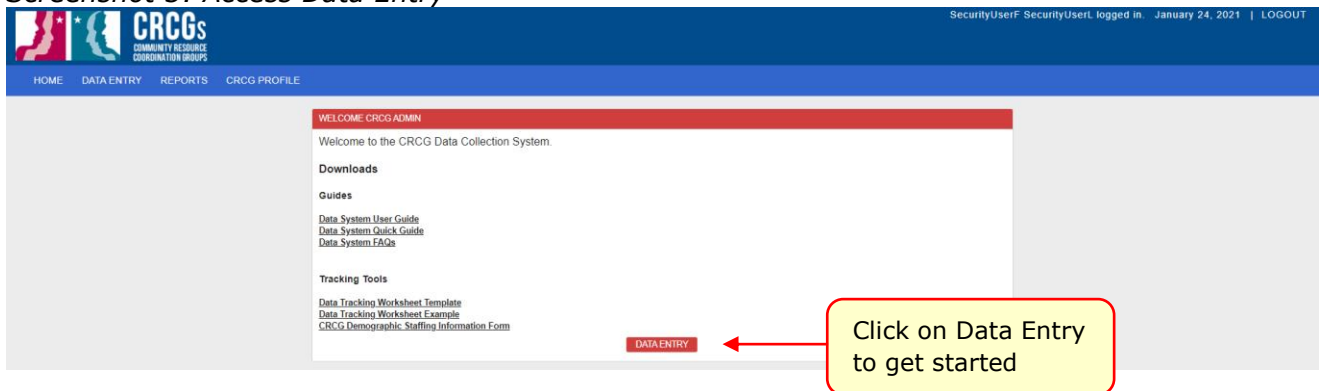


### Beginning the Data Entry Process

This data system collects aggregate data, not data for individual meetings and staffings. Data can be entered one time each month as a summary of that month's meeting and staffing activities. Use the data tracking worksheet in Appendix A to compile your information in one place and speed up data entry.

Beginning at the data collection system home page, click on the Data Entry button to start (see Screenshot 3).

*Screenshot 3: Access Data Entry*



### Data Entry Summary Page

Select the year for which you want to report data. Then select the corresponding CRCG from the drop-down list (see Screenshot 4). The drop-down list will only show CRCGs assigned to that user for data entry. Confirm that the counties listed for the selected CRCG are correct and click the Go button (see Screenshot 4).

Data submissions for your CRCG can be made by identifying the appropriate month in the first column and choosing an action button in the last column. The middle columns show who last modified the data and when. In the last column, the status of your data entry will be reflected with an action button defined in the box below.

## Action Buttons

**ADD:** No data have been entered for this month, start fresh here.

**IN PROGRESS:** Data have been entered for this month but have not been submitted.

**EDIT:** Data have been entered and submitted for this month, you may edit this information for up to 12 months.

**REVIEW:** Data have been entered and submitted for this month but cannot be changed.

Find the month you want to enter data for and click the Add button (see Screenshot 4). If you need to go back to the prior year, go to the Select Reporting Year at the top of the section and choose from the drop-down menu.

*Screenshot 4: Data Entry Summary Page*

The screenshot shows the 'DATA ENTRY' section of the CRCG Data Collection System. At the top, there's a navigation bar with 'HOME', 'DATA ENTRY', 'REPORTS', and 'CRCG PROFILE'. Below this, a 'SUMMARY' section contains instructions and a 'Download Local CRCG Data Entry Status' link. The main form area has two dropdown menus: '\* Select reporting year:' (set to 2018) and '\* Select CRCG:' (set to Office 1), followed by a 'Go' button. Below the form, it says 'Counties Served: ANDREWS, ANGELINA, ARANSAS'. The bottom section is a table titled 'Submissions for Office 1, year 2018' with columns for Date, Last Modified By, Last Modified Date, and Action. The table lists months from October 2018 to January 2018. Annotations with red arrows point to the year dropdown, the CRCG dropdown, the Go button, the counties list, and the 'ADD' buttons for July, August, and September 2018.

| Date           | Last Modified By       | Last Modified Date       | Action      |
|----------------|------------------------|--------------------------|-------------|
| October 2018   | Lee Ann Lindroth       | Oct 9, 2018, 1:17:18 PM  | IN PROGRESS |
| September 2018 | Sara Underwood         | Oct 9, 2018, 2:27:08 PM  | IN PROGRESS |
| August 2018    | Erica Haller-Stevenson | Oct 18, 2018, 9:02:44 AM | IN PROGRESS |
| July 2018      |                        |                          | ADD         |
| June 2018      |                        |                          | ADD         |
| May 2018       |                        |                          | ADD         |
| April 2018     |                        |                          | ADD         |
| March 2018     | Erica Haller-Stevenson | Oct 9, 2018, 4:27:31 PM  | REVIEW      |
| February 2018  | Erica Haller-Stevenson | Oct 18, 2018, 8:57:20 AM | REVIEW      |
| January 2018   |                        |                          | ADD         |

- ✓ **Tip!** Make sure you enter data for the month and year when the staffings occurred. For example, if it is now January 2019 and you are entering data from December 2018, you will select 2018 as the reporting year from the drop-down menu, then December for the month listed in the first column.

## Meeting Information

The Meeting Information screen gathers aggregate information for all meetings/staffings that occur each month. Check the information list for Data and Counties Served at the top of the section to make sure you are entering data for the correct month and counties (see Screenshot 5). All the items that have a red asterisk (\*) are required and necessary to complete data entry.

This screen asks if the CRCG met this month. If the CRCG did not meet for the reporting month, click No, add any notes for the CRCG's records in the Additional Information box, and click Submit. You will then be taken back to the Data Entry Summary page and will see a message in green that states "Submitted successfully for (month/year)."

If the CRCG did meet for the reporting month, click Yes and then you will be prompted to enter in additional details about the meetings/staffings.

#### *Screenshot 5: Meeting Information Page*

The screenshot shows the 'MEETING INFORMATION' page. At the top, there are three tabs: 'Data For: January 2021', 'Office Type: ALL AGES', and 'Counties Served: ANDERSON'. Below the tabs is a red header bar with the text 'MEETING INFORMATION'. Underneath the header, there is a message: 'If you have any questions or experience any difficulties, please contact the State CRCG Office at (512) 206-5255 or via email at [CRCG@hhsc.state.tx.us](mailto:CRCG@hhsc.state.tx.us).' Below this message is a section titled 'Enter meeting information for January 2021'. Inside this section, there is a question: '\* Did the CRCG meet this month?' with two radio buttons: 'Yes' and 'No'. Below the question is a text box labeled 'Additional Information'. At the bottom right of the form, there are two buttons: 'Submit' and 'Cancel'.

### **Purpose of the Meeting**

Check each reason that the CRCG met for the month (see Screenshot 6). If you choose Other, please provide additional information about the purpose of the meeting in the text box.

#### *Screenshot 6: Purpose of Meeting*

The screenshot shows the 'Purpose of Meeting' page. At the top, there is a dark blue header bar with the text 'Purpose of Meeting'. Below the header, there is a message: '\* Select all that apply:'. Below this message, there are four checkboxes: 'Staffing' (checked), 'Case check-in (follow-up with no changes to ISP)' (unchecked), 'Presentation, training, or general information sharing' (checked), and 'Other' (unchecked). Below the checkboxes, there is a text box for additional information.

### **Attendance**

Check each agency or program that had at least one representative present during the reported month (See Screenshot 7). It is important that you try to identify the correct agency or program for each representative and only use the "Other" option when the person does not fall under any other category.

### Screenshot 7: Meeting Information, Agency/Partner Attendance

**Attendance**

Please mark the agencies and/or programs that had a representative present for at least one meeting/staffing this month.

Attendance Date: January 2021

\* Attendees: (Check all that apply)

**DFPS (Department of Family and Protective Services)**

- ☐ Adult Protective Services
- ☒ Child Protective Services (including Post-Adoption Services)
- ☐ Child Protective Investigations
- ☒ Prevention and Early Intervention (STAR, SYSN, THV, MFVPP, HOPES, CYD, CBFS, Fatherhood, HEAL)
- ☐ Statewide Intake

**DSHS (Department of State Health Services)**

- ☒ DSHS (Department of State Health Services) - Title V Maternal & Child Health

**HHSC (Health and Human Services Commission)**

- ☐ AAA (Area Agency on Aging)
- ☒ ADRC (Aging and Disability Resource Centers)
- ☐ Independent Living
- ☐ LIDDA (Local Intellectual and Developmental Disability Authority)
- ☒ LMHA/LBHA (Local Mental/Behavioral Health Authority)
- ☐ State Benefits/Maximus

**Juvenile Justice**

- ☒ Juvenile Probation Officer
- ☐ TJJD (Texas Juvenile Justice Department)

**TDCJ (Texas Department of Criminal Justice)**

- ☐ Adult Parole/Probation
- ☐ TCOOMMI (Texas Correctional Office on Offenders with Medical or Mental Impairments)

**TDHCA (Texas Department of Housing and Community Affairs)**

- ☒ TDHCA (Texas Department of Housing and Community Affairs)

**TEA (Texas Education Agency)**

- ☐ Education Service Center (ESC)
- ☒ Independent School District (ISD) \*

abc ISD

**TWC (Texas Workforce Commission)**

- ☐ TWC (Texas Workforce Commission)

**Peer Representative**

- ☒ Family
- ☐ Youth

**Other Community Attendees**

- ☐ ADAC (Alcohol and Drug Abuse Council)
- ☐ CAC (Child Advocacy Centers)
- ☒ CASA (Court Appointed Special Advocates)
- ☐ Community Health Centers
- ☐ Faith Based
- ☐ Law Enforcement Representative
- ☒ Managed Care Representative
- ☒ Non-profit Social Service Providers \*

abc provider

- ☒ Other Mental Health Representative
- ☐ Substance Use and Misuse Representative
- ☒ Other \*

abc representative

Verify correct month/year and CRCG before starting data entry

Click all representatives that were in attendance

Choose "Other" only when the representative does not fall under the listed categories and include details

- ✓ **Tip!** The TEA-Independent School District (ISD), Non-profit Social Service Providers and Other selections require additional clarifying information to be entered in the textbox.

Once you have completed the Meeting Information page, you can save the information and move to other screens or you can erase all data you entered (see Screenshot 8). The Save & Next button saves the data you entered and takes you to the next screen. The Cancel button erases all data entered on this screen.

### Screenshot 8: Save Data and Change Screens

Cancel deletes all data entered

Cancel

Save & Next saves data and takes you to the next screen

Save & Next

## Staffing Information: First Time Staffings

This screen collects information about staffings that were the first meetings a CRCG had with individuals and their informal support systems (e.g., family, caregivers, etc.) to develop an individualized service plan (ISP). If no first time staffings occurred during the reported month, this screen may be skipped. Follow the instructions below to enter data or skip the screen.

### First Time Staffing Information

If you do not have any first time staffing information to report, you can skip this screen and proceed to the next screen regarding follow up staffings. Leave the first time staffing box unchecked, leave the whole page blank, and scroll to the bottom of the page to click the Save & Next button (see Screenshot 9).

*Screenshot 9: Skipping First Time Staffings*

Save & Previous Cancel Save & Next

If you don't have first time staffings to report, leave the whole page blank and click Save & Next to proceed to Follow Up Staffings screen

If you do have first time staffings to report, begin by entering information about the number of staffings (see Screenshot 10 for all steps). First, click the box to indicate you have data to enter for first time staffings. Next, enter the number of people staffed according to their county of residence. Then, enter the number of staffings that were related to reintegration or an emergency staffing. Last, enter the number of staffings that the individual and/or family was present. Continue down the screen to the next section.

*Screenshot 10: First Time Staffing Information*

All \* mandatory fields should be entered

ENTER STAFFING INFORMATION

First Time ☒ I have data to enter for First Time staffings

\*1. Number of staffings per individual's county of residence  
ANDERSON 5  
Total number of first time staffing(s): 5

\*2. Of the total number of first time staffings, how many were reintegration staffings: 1

\*3. Of the total number of first time staffings, how many were emergency staffings: 1

\*4. How many first time staffings were the individual/families present: 5

Enter the number of staffings for each county

Click the box if you have first time staffings to report

Answer the remaining questions and continue down the screen

- ✓ **Tip!** If your CRCG represents multiple counties, you must enter a number by every county, even if that number is zero. The total will auto-populate.

## Demographics

Enter demographic data only for the individual(s) who were staffed. Report only data that were collected directly from the individual or individual's family. Do not guess! You can use the CRCG Demographic Staffing Information Form (see Appendix B) provided by the State CRCG Office. If you are unable to obtain accurate demographic information about individuals served, the data system provides an option for counting people without that information.

For each individual who is staffed by the CRCG, enter their age, ethnicity, race, gender, and primary language. Then click the Add button to add each person (see Screenshot 11). If you do not know the information, you can select No Data Collected while still counting the person's participation (see Screenshot 11). Repeat this procedure as many times as needed. As you add people, a list will develop.

Screenshot 11: Demographics

| Age | Ethnicity         | Race                            | Gender                 | Primary Language | Delete |
|-----|-------------------|---------------------------------|------------------------|------------------|--------|
| 15  | Non-Hispanic      | Black or African American       | Male                   | English          |        |
| 40  | Non-Hispanic      | Asian                           | Female                 | Vietnamese       |        |
| 25  | Hispanic          | White                           | Female                 | Spanish          |        |
| 17  | No Data Collected | No Data Collected               | Male                   | English          |        |
| 65  | Non-Hispanic      | Middle Eastern or North African | Choose Not To Disclose | English          |        |

- ✓ **Tip!** The Add button will not light up until each characteristic is entered.
- ✓ **Tip!** If you select Other, you must add additional information in the box.
- ✓ **Tip!** Use the No Data Collected option in the drop-down menu if you do not know the answer for a particular characteristic.

## Strengths Assessment

Enter data about the strengths that individuals and families reported (see Screenshot 12). First, click Add Strengths. A pop-up box will appear with a list of Strengths.

### Screenshot 12: Strengths Assessment

**Strengths Assessment**

Add a strength and report the frequency as expressed by the individuals/families during the staffings.

[Add Strengths](#)

Additional Information

Next, enter the number of times each strength was reported by individuals and families in the Total column. Then, click Add to add strengths (see Screenshot 13). If you click Close, the information you entered will not be saved.

### Screenshot 13: Strengths Assessment Pop-up Box

**Strengths Assessment**

| Category                          | Total |
|-----------------------------------|-------|
| Academics/School                  | 2     |
| Basic Needs/Self-Sufficiency      | 5     |
| Caregiver Involvement             |       |
| Community Life/Social Engagement  |       |
| Cultural Identity                 | 1     |
| Employment/Vocational             | 2     |
| Family Peer Support               |       |
| Family Strengths                  | 4     |
| Healthcare Coverage               |       |
| Housing Stability                 | 4     |
| Interpersonal Skills              | 3     |
| Knowledge of Service Options      |       |
| Natural Supports                  | 5     |
| Optimism                          | 1     |
| Positive Therapeutic Relationship |       |
| Recovery                          |       |
| Recreation and Leisure Activities | 1     |
| Resilience                        |       |
| Resourcefulness                   |       |
| Safety                            |       |
| Self-care                         | 3     |
| Spiritual/Religious               |       |
| Talents/Interests                 | 2     |
| Other                             | 1     |

Enter the total number of times each strength was reported

Click Add to complete entry

[Add](#) [Close](#)

A list of strengths will develop on your screen (see Screenshot 14). Once the list of strengths has been generated, you can delete any strength categories by clicking on the trash can icon under the Delete column. You can edit the strengths by clicking Add/Edit Strengths at the top of the section. Finally, you can add additional information for your CRCGs records in the Additional Information text box at the bottom of this section.



### Screenshot 14: Strengths Assessment List

**Strengths Assessment**

Add a strength and report the frequency as expressed by the individuals/families during the staffings.

[Add/Edit Strengths](#) Click to add or edit

| Category                          | Total | Delete |
|-----------------------------------|-------|--------|
| Academics/School                  | 2     |        |
| Basic Needs/Self-Sufficiency      | 5     |        |
| Cultural Identity                 | 1     |        |
| Employment/Vocational             | 2     |        |
| Family Strengths                  | 4     |        |
| Housing Stability                 | 4     |        |
| Interpersonal Skills              | 3     |        |
| Natural Supports                  | 5     |        |
| Positive Therapeutic Relationship | 1     |        |
| Recreation and Leisure Activities | 1     |        |
| Self-care                         | 3     |        |
| Talents/Interests                 | 2     |        |
| Other                             | 1     |        |

Additional Information

 Add additional information here

Click the trash can icon to delete strengths

### Concerns/Needs Assessment

Enter data about the concerns and needs that individuals and families reported (see Screenshot 15). First, click Add Concerns/Needs. A pop-up box will appear with a list of Concerns and Needs.

### Screenshot 15: Concerns/Needs Assessment

**Concerns/Needs Assessment**

Add a concern/need and report the frequency as expressed by the individuals/families during the staffings.

[Add Concerns/Needs](#) Click to add concerns/needs

Additional Information

Next, enter the number of times each concern and need was reported by individuals and families in the Total column. Then, click Add to add concerns and needs (see Screenshot 16). If you click Close, the information you entered will not be saved.

*Screenshot 16: Concerns/Needs Assessment Pop-up Box*

| Concerns/Need Assessment                                  |   |
|---|---|
| Basic Needs and Self-sufficiency                          | 3 |
| Physical Disability Services                              |   |
| Employment/Vocational Training                            | 1 |
| Family/Peer Support                                       |   |
| Family Therapy/Family-based Services                      | 2 |
| Housing/Rental Assistance                                 | 1 |
| Healthcare Coverage                                       |   |
| Intellectual and Developmental Disability Services        | 1 |
| Justice Involvement                                       |   |
| Legal Assistance  |   |
| LGBTQ Specific Services                                   |   |
| Mental Health Care  | 5 |
| Medical Improvements to the Home                          |   |
| Physical Health and Functioning                           |   |
| Risk Behaviors  | 4 |
| Respite   |   |
| Returning to the Community from a Placement               | 1 |
| Substance Use and Misuse Programs/Services                |   |
| Social Engagement   |   |
| Skill Development   |   |
| Service Coordination                                      |   |
| Transition Planning from Youth Services to Adult Services | 1 |
| Transportation  |   |
| Trauma Focused Services                                   | 2 |
| Other   |   |

Enter the total number of times each concern and need was reported

Click Add to complete entry

Add Close

A list of concerns and needs will develop on your screen (see Screenshot 17). Once the list of concerns and needs has been generated, you can delete any concern or need categories by clicking on the trash can icon under the Delete column. You can edit the concerns and needs by clicking Add/Edit Concerns/Needs at the top of the section. Finally, you can add additional information for your CRCGs records in the Additional Information text box at the bottom of this section.

### Screenshot 17: Concerns/Needs Assessment List

**Concerns/Needs Assessment**

Add a concern/need and report the frequency as expressed by the individuals/families during the staffings.

[Add/Edit Concerns/Needs](#) Click to add or edit

| Category  | Total | Delete |
|---|-------|--------|
| Academics/School  | 2     |        |
| Aging Services  | 1     |        |
| Autism Services   | 1     |        |
| Basic Needs and Self-sufficiency                          | 3     |        |
| Employment/Vocational Training                            | 1     |        |
| Family Therapy/Family-based Services                      | 2     |        |
| Housing/Rental Assistance                                 | 1     |        |
| Intellectual and Developmental Disability Services        | 1     |        |
| Mental Health Care  | 5     |        |
| Risk Behaviors  | 4     |        |
| Returning to the Community from a Placement               | 1     |        |
| Transition Planning from Youth Services to Adult Services | 1     |        |
| Trauma Focused Services                                   | 2     |        |

Click the trash can icon to delete concerns/needs

Additional Information

Add additional information here

### Individual Service Plans (ISPs)

Report the number of times each service and support was recommended in the ISPs created during the month. First, click Add ISP services and support (see Screenshot 18) to open a pop-up box.

### Screenshot 18: Individual Service Plan Recommendations

**Individual Service Plans**

Click the add ISP services and support button to report the frequency of each service and support included in Individual Service Plans created this month.

[Add ISP services and support](#) Click to add ISP services and supports

Additional Information

Then, enter the number of times this service or support was included in an ISP for all participants throughout the month in the pop-up box. If you select the Other category, then you will be required to enter additional information. Once you have entered in all the ISP services and supports, click the Add button (see Screenshot 19).

*Screenshot 19: Individual Service Plan Recommendations Pop-up Box*

| Category   | Total |
|--|-------|
| ADRC (Aging and Disability Resource Center)                            | 1     |
| Autism Services  | 1     |
| Basic Needs  | 2     |
| Child Care   |       |
| Children with Special Healthcare Needs (CSHCN) Program                 |       |
| Community Support  |       |
| Diversion Slots  |       |
| Employment/Vocational Training   | 2     |
| Family therapy/Family-based services                                   | 3     |
| HCBS-AMH   |       |
| Housing  | 1     |
| Homelessness Prevention  |       |
| Intellectual and Developmental Disability Services                     | 1     |
| In Home Healthcare   |       |
| Job Training   |       |
| Juvenile Justice Services  |       |
| Legal Assistance   |       |
| LGBTQ Specific Services  |       |
| Mental Health Services   | 5     |
| Mentoring Program or Social Skills Program                             |       |
| Non-educational Funds Application                                      | 1     |
| Other School-Based Interventions, Services, or Supports                |       |
| Physical Health Services (Dr. appts., special equip/supplies for home) |       |
| Report Generated by Child Care   |       |

Enter the total number of times each service and support was recommended

Click Add to complete entry

Add Close

✓ **Tip!** If you choose Other, you must add additional information in the box or you will not be able to move forward.

After you click Add, a list will develop (see Screenshot 20).

## Screenshot 20: Individual Service Plan Recommendations List

Individual Service Plans

Click the add ISP services and support button to report the frequency of each service and support included in Individual Service Plans created this month.

Add/Edit ISP services and support

Click to add or edit ISP services and supports

| Individual Service Plan                                   | Total | Delete |
|---|-------|--------|
| ADRC (Aging and Disability Resource Center)               | 1     |        |
| Autism Services   | 1     |        |
| Basic Needs   | 3     |        |
| Employment/Vocational Training                            | 2     |        |
| Family therapy/Family-based services                      | 2     |        |
| Housing   | 1     |        |
| Intellectual and Developmental Disability Services        | 1     |        |
| Mental Health Services                                    | 5     |        |
| Non-educational Funds Application                         | 1     |        |
| Parent Support or Skills Group                            | 2     |        |
| Placement   | 1     |        |
| School-based Behavioral Interventions                     | 1     |        |
| Special Education Services                                | 1     |        |
| Transition Planning from Youth Services to Adult Services | 1     |        |
| 1915(c) Waivers (MDCP, YES, HCS, CLASS, DBMD, TXHml)      | 2     |        |
| Other (Specify) - Other ISP recommendation                | 1     |        |

Click the trash can icon to delete ISP services and supports

Additional Information

Add additional information here

If you selected Placement and/or 1915(c) Waivers (MDCP, YES, HCS, CLASS, DBMD, TXHmL) in the pop-up box, you are required to enter the number of times each specific placement or waiver was recommended in ISPs during this month in the subsequent section (see Screenshot 21). You will also enter the number of times the ISP included recommendations for the family during the child's placement and plans for their return.

### Screenshot 21: Individual Service Plan 1915(c) Waivers and Placement Recommendations

\*If a 1915(c) Waiver was recommended as part of Individual Service Plans, please enter the number of times each type of Waiver was recommended by the CRCG this month:

TX Medically Dependent Children Program (MDCP)

TX Youth Empowerment Services (YES)

TX Home and Community-based Services (HCS)

TX Community Living Assistance & Support Services (CLASS)

TX Deaf Blind w/Multiple Disabilities (DBMD)

TX Home Living (TxHmL)

\*If placement was recommended as part of Individual Service Plans, please enter the number of times each type of placement was recommended by the CRCG this month:

Waco Center for Youth

North Texas State Hospital

Other residential treatment facility

HHSC/DFPS Residential Treatment Center Relinquishment Avoidance Project

Nursing facility

How many Individual Service Plans included recommendations for the family during the child's placement and plans for their return?

- ✓ **Tip!** The number of 1915(c) Waivers in the recommended list must match the sum of individual 1915(c) Waivers in this section.
- ✓ **Tip!** The number of placements in the recommended list must match the sum of placement recommendations in this section.

After you complete all of the sections on the First Time Staffings screen, click the Save & Next button to move to the next screen (see Screenshot 22).

### Screenshot 22: Save Data and Change Screens

Save & Previous Cancel Save & Next

Click Save & Next to save and go to the next section

## Staffing Information: Follow Up Staffings

This screen collects information about follow up staffings. Follow up staffings are held when an update or change is needed on the individual's ISP. If no follow up staffings occurred during the reported month, this screen may be skipped. Follow the instructions below to enter data or skip the screen.

### Follow Up Staffing Information

If you do not have any follow up staffing information to report, you can skip this screen and proceed to the next screen. Leave the follow up staffing box unchecked, leave the whole page blank, and scroll to the bottom of the page to click the Save & Next button (see Screenshot 23).

### Screenshot 23: Skipping Follow Up Staffings

Save & Previous      Cancel      Save & Next

If you don't have follow up staffings to report, leave the whole page blank and click Save & Next to proceed to the next section

If you do have follow up staffings to report, begin by entering information about the number of staffings (see Screenshot 24 for all instructions). First, click the box to indicate you have data to enter for follow up staffings. Next, enter the number of people staffed according to their county of residence. Then, enter the number of staffings that were related to reintegration or an emergency staffing. Last, enter the number of staffings that the individual and/or family was present. Continue down the screen to the next section.

### Screenshot 24: Follow Up Staffing Information

ENTER STAFFING INFORMATION

Follow Up ☒ I have data to enter for Follow Up staffings

\*1. Number of staffings per individual's county of residence  
ANDERSON 2  
Total number of follow up staffing(s): 2

\*2. Of the total number of follow up staffings, how many were reintegration staffings: 1

\*3. Of the total number of follow up staffings, how many were emergency staffings: 1

\*4. How many follow up staffings were the individual/families present: 2

Click the box if you have follow up staffings to report

Enter the number of staffings for each county

Answer the remaining questions and continue down the screen

- ✓ **Tip!** If your CRCG represents multiple counties, you must enter a number by every county, even if that number is zero. The total will auto-populate.

## Demographics

Enter demographic data only for the individual(s) who were staffed. Report only data that were collected directly from the individual or individual's family. Do not guess! You can use the CRCG Demographic Staffing Information Form (see Appendix B) provided by the State CRCG Office. If you are unable to obtain accurate demographic information about individuals served, the data system provides an option for counting people without that information.

For each individual who is staffed by the CRCG, enter their age, ethnicity, race, gender, and primary language. Then click the Add button to add each person (see Screenshot 25). If you do not know the information, you can select No Data Collected while still counting the person's participation (see Screenshot 25). Repeat this procedure as many times as needed. As you add people, a list will develop.

### Screenshot 25: Demographics

**Demographics**  
Report demographic data for each individual staffed. Report data only collected from the individual or individual's family.

Age Ethnicity Race Gender Primary Language Add

| Age | Ethnicity         | Race               | Gender | Primary Language | Delete |
|-----|-------------------|--------------------|--------|------------------|--------|
| 16  | Hispanic          | Other - Other race | Female | English          |        |
| 28  | No Data Collected | No Data Collected  | Male   | English          |        |

1. Enter age  
2. Choose options for each person  
3. Click Add  
Repeat as needed

- ✓ **Tip!** The Add button will not light up until each characteristic is entered.
- ✓ **Tip!** If you select Other, you must add additional information in the box.
- ✓ **Tip!** Use the No Data Collected option in the drop-down menu if you do not know the answer for a particular characteristic.

### Strengths Assessment

Enter data about the strengths that individuals and families reported (see Screenshot 26). First, click Add Strengths. A pop-up box will appear with a list of Strengths.

### Screenshot 26: Strengths Assessment

**Strengths Assessment**  
Add a strength and report the frequency as expressed by the individuals/families during the staffings.

Add Strengths Click to add strengths

Additional Information

Next, enter the number of times each strength was reported by individuals and families in the Total column. Then, click Add to add strengths (see Screenshot 27). If you click Close, the information you entered will not be saved.



Screenshot 27: Strengths Assessment Pop-up Box

| Category                          | Total                |
|-----------------------------------|----------------------|
| Academics/School                  | <input type="text"/> |
| Basic Needs/Self-Sufficiency      | 1                    |
| Caregiver Involvement             | <input type="text"/> |
| Community Life/Social Engagement  | 1                    |
| Cultural Identity                 | <input type="text"/> |
| Employment/Vocational             | <input type="text"/> |
| Family Peer Support               | <input type="text"/> |
| Family Strengths                  | 2                    |
| Healthcare Coverage               | 1                    |
| Housing Stability                 | <input type="text"/> |
| Interpersonal Skills              | <input type="text"/> |
| Knowledge of Service Options      | 1                    |
| Natural Supports                  | 1                    |
| Optimism                          | <input type="text"/> |
| Positive Therapeutic Relationship | <input type="text"/> |
| Recovery                          | <input type="text"/> |
| Recreation and Leisure Activities | 1                    |
| Resilience                        | <input type="text"/> |
| Resourcefulness                   | <input type="text"/> |
| Safety                            | <input type="text"/> |
| Self-care                         | <input type="text"/> |
| Spiritual/Religious               | <input type="text"/> |
| Talents/Interests                 | 2                    |
| Other                             | 1                    |

Enter the total number of times each strength was reported.

Click Add to complete entry

Add Close

A list of strengths will develop on your screen (see Screenshot 28). Once the list of strengths has been generated, you can delete any strength categories by clicking on the trash can icon under the Delete column. You can edit the strengths by clicking Add/Edit Strengths at the top of the section. Finally, you can add additional information for your CRCGs records in the Additional Information text box at the bottom of this section.

### Screenshot 28: Strengths Assessment List

**Strengths Assessment**

Add a strength and report the frequency as expressed by the individuals/families during the staffings.

[Add/Edit Strengths](#)

| Category                          | Total | Delete |
|-----------------------------------|-------|--------|
| Basic Needs/Self-Sufficiency      | 1     |        |
| Community Life/Social Engagement  | 1     |        |
| Family Strengths                  | 2     |        |
| Healthcare Coverage               | 1     |        |
| Knowledge of Service Options      | 1     |        |
| Natural Supports                  | 1     |        |
| Recreation and Leisure Activities | 1     |        |
| Talents/Interests                 | 2     |        |
| Other                             | 1     |        |

Additional Information

### Concerns/Needs Assessment

Enter data about the concerns and needs that individuals and families reported (see Screenshot 29). First, click Add Concerns/Needs. A pop-up box will appear with a list of Concerns and Needs.

### Screenshot 29: Concerns/Needs Assessment

**Concerns/Needs Assessment**

Add a concern/need and report the frequency as expressed by the individuals/families during the staffings.

[Add Concerns/Needs](#)

Additional Information

Next, enter the number of times each concern and need was reported by individuals and families in the Total column. Then, click Add to add concerns and needs (see Screenshot 30). If you click Close, the information you entered will not be saved.

Screenshot 30: Concerns/Needs Assessment Pop-up Box

| Category   | Total |
|--|-------|
| Academics/School                                   | 1     |
| Aging Services                                     |       |
| At Risk for Placement                              |       |
| Autism Services                                    |       |
| Basic Needs and Self-sufficiency                   | 1     |
| Physical Disability Services                       |       |
| Employment/Vocational Training                     | 1     |
| Family/Peer Support                                | 2     |
| Family Therapy/Family-based Services               |       |
| Housing/Rental Assistance                          | 1     |
| Healthcare Coverage                                |       |
| Intellectual and Developmental Disability Services |       |
| Justice Involvement                                | 1     |
| Legal Assistance                                   |       |
| LGBTQIA Supports                                   |       |
| Mental Health Care                                 | 2     |
| Medical Improvements to the Home                   |       |
| Physical Health and Functioning                    |       |
| Risk Behaviors                                     | 1     |
| Respite  |       |
| Returning to the Community from a Placement        | 1     |
| Substance Use and Misuse Programs/Services         | 1     |
| Social Engagement                                  |       |
| Skill Development                                  | 2     |

Enter the total number of times each concern and need were reported.

Click Add to complete entry

Add Close

A list of concerns and needs will develop on your screen (see Screenshot 31). Once the list of concerns and needs has been generated, you can delete any concern or need categories by clicking on the trash can icon under the Delete column. You can edit the concerns and needs by clicking Add/Edit Concerns/Needs at the top of the section. Finally, you can add additional information for your CRCGs records in the Additional Information text box at the bottom of this section.

### Screenshot 31: Concerns/Needs Assessment List

**Concerns/Needs Assessment**

Add a concern/need and report the frequency as expressed by the individuals/families during the staffings.

[Add/Edit Concerns/Needs](#) Click to add or edit

| Category                                    | Total | Delete |
|---|-------|--------|
| Academics/School                            | 1     |        |
| Basic Needs and Self-sufficiency            | 1     |        |
| Employment/Vocational Training              | 1     |        |
| Family/Peer Support                         | 2     |        |
| Housing/Rental Assistance                   | 1     |        |
| Justice Involvement                         | 1     |        |
| Mental Health Care                          | 2     |        |
| Risk Behaviors                              | 1     |        |
| Returning to the Community from a Placement | 1     |        |
| Substance Use and Misuse Programs/Services  | 1     |        |
| Skill Development                           | 2     |        |
| Trauma Focused Services                     | 1     |        |
| Other                                       | 1     |        |

Click the trash can icon to delete concerns/needs

Additional Information

Add additional information here

### Individual Service Plans (ISPs)

Report the frequency of each service and support recommended in the ISPs created from the staffings during the month. First, click Add ISP Services and Support (see Screenshot 32). A pop-up box will appear with a list of services and supports.

### Screenshot 32: Individual Service Plan Recommendations

**Individual Service Plans**

Click the add ISP services and support button to report the frequency of each service and support included in Individual Service Plans created this month.

[Add ISP services and support](#) Click to add ISP services and supports

Additional Information

Next, enter the number of times each service or support was included in an ISP for all participants throughout the month in the pop-up box. If you select the Other category, then you will be required to enter additional information. Once you have entered in all the ISP services and supports, click the Add button (see Screenshot 33).

Screenshot 33: Individual Service Plan Recommendations Pop-up Box

| Category   | Total |
|--|-------|
| ADRC (Aging and Disability Resource Center)                            |       |
| Autism Services  |       |
| Basic Needs  | 1     |
| Child Care   |       |
| Children with Special Healthcare Needs (CSHCN) Program                 |       |
| Community Support  | 2     |
| Diversion Slots  |       |
| Employment/Vocational Training   |       |
| Family therapy/Family-based services                                   |       |
| HCBS-AMH   |       |
| Housing  |       |
| Homelessness Prevention  |       |
| Intellectual and Developmental Disability Services                     |       |
| In Home Healthcare   |       |
| Job Training   | 1     |
| Juvenile Justice Services  | 1     |
| Legal Assistance   |       |
| LGBTQIA Supports   |       |
| Mental Health Services   | 2     |
| Mentoring Program or Social Skills Program                             | 1     |
| Non-educational Funds Application                                      |       |
| Other School-Based Interventions, Services, or Supports                |       |
| Physical Health Services (Dr. appts., special equip/supplies for home) | 1     |
| Parent Support or Skills Group   |       |

Enter the total number of times each service or support was reported

Click Add to complete entry

Add Close

✓ **Tip!** If you choose Other, you must add additional information in the box or you will not be able to move forward.

After you click Add, a list will develop (see Screenshot 34).

*Screenshot 34: Individual Service Plan Recommendations List*

**Individual Service Plans**

Click the add ISP services and support button to report the frequency of each service and support included in Individual Service Plans created this month.

[Add/Edit ISP services and support](#) Click to add or edit ISP services and supports

| Individual Service Plan  | Total | Delete |
|--|-------|--------|
| Basic Needs  | 1     |        |
| Community Support  | 2     |        |
| Job Training   | 1     |        |
| Juvenile Justice Services  | 1     |        |
| Mental Health Services   | 2     |        |
| Mentoring Program or Social Skills Program                             | 1     |        |
| Physical Health Services (Dr. appts., special equip/supplies for home) | 1     |        |
| Placement  | 1     |        |
| State Benefits (SNAP, Medicaid, TANF)                                  | 1     |        |
| Substance Use and Misuse Programs/Services                             | 1     |        |
| 1915(c) Waivers (MDCP, YES, HCS, CLASS, DBMD, TXHml)                   | 1     |        |
| Other (Specify) - Other ISP recommendation                             | 1     |        |

Click the trash can icon to delete ISP services and supports

Additional Information

Add additional information here

If you selected Placement and/or 1915(c) Waivers (MDCP, YES, HCS, CLASS, DBMD, TXHmL) in the pop-up box, you are required to enter the number of times each was recommended in ISPs during this month in the subsequent section (see Screenshot 35). Next, enter the number of times the ISP included recommendations for the family during the child's placement and plans for their return.

### Screenshot 35: Individual Service Plan 1915(c) Waivers and Placement Recommendations

- ✓ **Tip!** The number of 1915(c) Waivers in the recommended list must match the sum of individual 1915(c) Waivers in this section.
- ✓ **Tip!** The number of placements in the recommended list must match the sum of placement recommendations in this section.

After you complete all of the sections on the Follow Up Staffing screen, click the Save & Next button to move to the next screen (see Screenshot 36).

### Screenshot 36: Save Data and Change Screens

## General Questions

This is the last screen in the system and collects additional staffing details, information about individuals who returned from out of home placements, barriers to providing services or supports, and additional information that the CRCG would like to retain for their records.

### Staffing Details

Questions 1-5 capture more staffing details. Enter aggregate information for all staffings in the reported month (see Screenshot 37).

When answering question 1: Of the Individual Service Plans created this month, how many recommended the least restrictive, most normative environment that is clinically appropriate, consider the following:

- The number entered should not exceed the number of first time and follow-up staffings entered for the month.
- Out of home placements such as inpatient settings, residential treatment centers, and nursing facilities, may be considered the least restrictive, most normative environment that is clinically appropriate if the recommendation best meets the needs of the individual and other community-based recommendations have been exhausted or cannot meet the needs of the individual.
- If no staffings occurred for the month, go back to the Meeting Information page, deselect "Staffings" under Meeting Purpose, and then click "Submit." You should only land on the General Questions page if staffings occurred during the month.

*Screenshot 37: Staffing Details*

**GENERAL QUESTIONS**

\*1. Of the Individual Service Plans created this month, how many recommended the least restrictive, most normative environment that is clinically appropriate?

2. How many staffings were held this month where an interpreter was not available for an individual/family who needed or requested one?

3. How many staffings this month were the result of the permanency planning notification requirement for children with developmental disabilities in institutional settings?

4. How many non-ed fund applications were submitted for endorsement this month?

5. How many staffings this month were for juveniles under 12 that were referred by probation?

Enter information for each question

- ✓ **Tip!** Question 1 is required, and you will not be able to move forward unless the box is completed.

## Out of Home Placement Return

Enter the number of individuals staffed during this report period who returned from out of home placement at behavioral, medical, and correctional facilities (see Screenshot 38).

*Screenshot 38: Returns from Placement*

6. Indicate the number of individual(s) staffed this month that returned from each out of home placement (If applicable):

|   |                      |
|---|----------------------|
| Waco Center for Youth   | <input type="text"/> |
| North Texas State Hospital  | <input type="text"/> |
| HHSC/DFPS Residential Treatment Center Relinquishment Avoidance Project | <input type="text"/> |
| Other residential treatment facility                                    | <input type="text"/> |
| TJJD Commitment   | <input type="text"/> |
| Probation Placement   | <input type="text"/> |
| Nursing facility  | <input type="text"/> |

Enter the number of people who returned from each placement this month

## Barriers

This section asks you to identify barriers in the process of creating ISPs. The barriers are divided into four sections with boxes to fill in each section. Enter the



number of times physical or service availability barriers were identified (see Screenshot 39).

*Screenshot 39: Physical and Service Availability Barriers*

7. Indicate the number of times each barrier was identified this month through the process of creating Individual Service Plans:

| Physical Barriers  | Service Availability Barriers   |
|--|---|
| The individual/family lacks transportation.                                | There is a lack of funding for services.  |
| The individual/family does not have means of communication.                | There is a waitlist for programs/services.  |
| There is a language barrier between the individual/family and the CRCG.    | The individual/family does not meet the eligibility requirements.   |
| There are scheduling conflicts between the individual/family and the CRCG. | The CRCG has a lack of knowledge about resources and services.  |
|  | There is a lack of consistency in delivery of state-based services.   |
|  | There is a lack of appropriate programs/services (e.g., Transition services; Services for Autism Spectrum Disorders). |
|  | There are no program/service providers available.   |
|  | Please list the type of programs/services that were lacking or unavailable.   |

Enter the number of times barriers were identified this month

If you selected lack of appropriate programs/ services barrier, you will be asked for additional details

- ✓ **Tip!** The Service Availability section allows you to provide additional information if you indicated that a type of program or service was lacking or unavailable.

Enter the number of times agency barriers were identified or individuals chose not to access a service (see Screenshot 40).

*Screenshot 40: Agency and Client Choice Barriers*

| Agency Barriers  | Client Choice to Not Access Services  |
|--|---|
| There is insufficient staff.   | The individual/family had previous negative experiences accessing services.   |
| There is a change in staff.  | The individual/family perceives a lack of culturally competent services.  |
| Professional agency specific language hinders collaboration.   | The individual/family has limited knowledge to recognize the need for services.                                     |
| There is a lack of clear agency processes.   | The individual/family lacks the understanding of the process and programs.  |
| There is a lack of participation of state agencies.  | The individual/family engages in behaviors that result in the rejection from services.                              |
| There is a lack of accountability of service providers.  | The individual/family was previously noncompliant.  |
| Please list all agencies or programs that report lack of funding as primary barrier to support ISP services. | The individual/family has a preference for a small number of service providers.                                     |
| glkshae  | The individual/family has a concern about engaging with services (including immigration status, CPS, doctors, etc.) |

Provide additional information about agency barriers here

Enter the number of times barriers were identified this month

- ✓ **Tip!** The Agency Barriers section allows you to list all agencies or programs that report lack of funding as a primary barrier to support ISP services.

## Additional Information

In the final section on this screen, provide additional information that you would like to retain for your CRCG's records (see Screenshot 41).

*Screenshot 41: Additional Information*

8. Please add any additional information you would like to retain for your CRCG records

alskdflj

After you complete all of the sections on the General Questions screen, data entry is complete for this month. To submit your data click the Submit button (see Screenshot 42). If you want to make edits to previous pages click the Save & Previous button. The data will not be officially entered until you click Submit.

*Screenshot 42: Save and Submit Data*

Save & Previous

Submit

Cancel

Once you have completed all screens, you can go back to previous pages or submit the information

## Data Entry Status

After submitting your data, you return to the Data Summary screen (see Screenshot 43). Here you can check the status of data submissions. If you correctly submitted the data you just entered, the action column will show a blue Edit button meaning data entry is complete and you have 12 months to edit the information. If you submitted data for a period of 12 or more months in the past, you will see a red Review button instead (this data cannot be edited). If you saved data but did not submit it, the action column will show a white In Progress button (for examples of each button see Screenshot 43).

*Screenshot 43: Data Entry Status*

**SUMMARY**

Thank you for accessing the CRCG monthly data collection system as an Admin. Admins may review and edit local CRCG data entries. Admins may also view statewide and local CRCG reports.

Click the link below to download the record of local CRCG data entry.

[Download Local CRCG Data Entry Status](#)

Select the year and CRCG to view data entered by a local CRCG. Select the month for review and editing capabilities.

\* Select reporting year: 2018 \* Select CRCG: Office 1 [Go](#)

Counties Served: ANDREWS, ANGELINA, ARANSAS

**Submitted successfully for August 2018**

Submissions for Office 1, year 2018

| Date           | Last Modified By       | Last Modified Date       | Action      |
|----------------|------------------------|--------------------------|-------------|
| October 2018   | Lee Ann Lindroth       | Oct 9, 2018, 1:17:18 PM  | IN PROGRESS |
| September 2018 | Sara Underwood         | Oct 9, 2018, 2:27:08 PM  | IN PROGRESS |
| August 2018    | Erica Haller-Stevenson | Oct 18, 2018, 9:14:16 AM | EDIT        |
| July 2018      |                        |                          | ADD         |
| June 2018      |                        |                          | ADD         |
| May 2018       |                        |                          | ADD         |
| April 2018     |                        |                          | ADD         |
| March 2018     | Erica Haller-Stevenson |                          | REVIEW      |
| February 2018  | Erica Haller-Stevenson |                          | REVIEW      |
| January 2018   |                        |                          | ADD         |

White IN PROGRESS button indicates data has NOT been submitted.

The blue EDIT button indicates the data was successfully submitted.

The red REVIEW button indicates the data is submitted and cannot be edited.

Once you have checked to make sure your monthly data was successfully submitted, you can enter data for a new month, add to or modify existing data (for past 6 months), or log out.

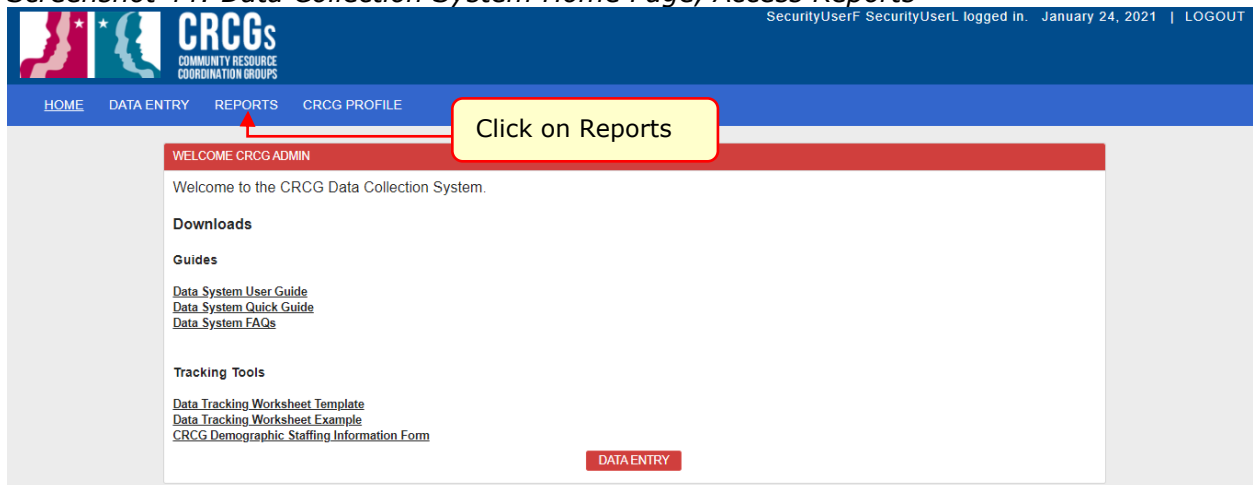
## CRCG Data Reports

You can access all the data you have entered along with statewide data. You can choose time periods (up to two years) you want to view and choose graphs or tables to review the data.

### Accessing Reports

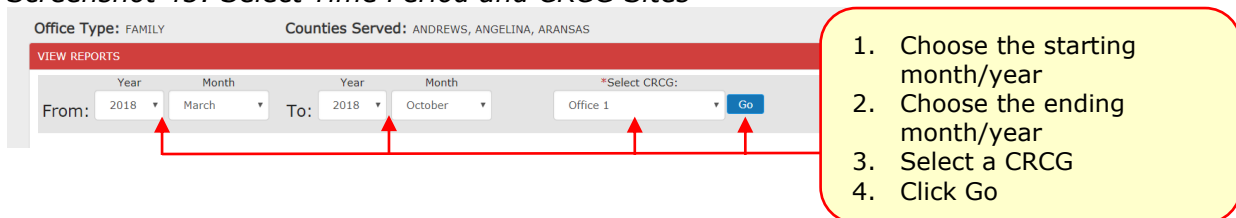
To access data reports, click on the Reports tab at the top of the data collection system home page (see Screenshot 44).

*Screenshot 44: Data Collection System Home Page, Access Reports*



Once on the Reports screen, select the time frame for the report (see Screenshot 45). You can view a single month or multiple months (up to two years) at one time. Select your CRCG from the drop-down menu or statewide data and click Go (see Screenshot 45).

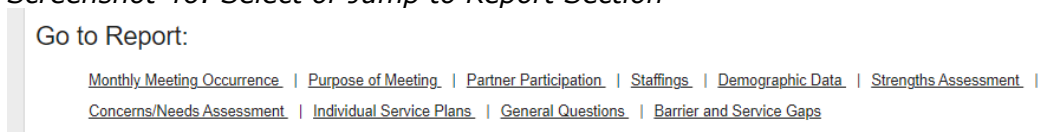
*Screenshot 45: Select Time Period and CRCG Sites*



### Viewing Reports

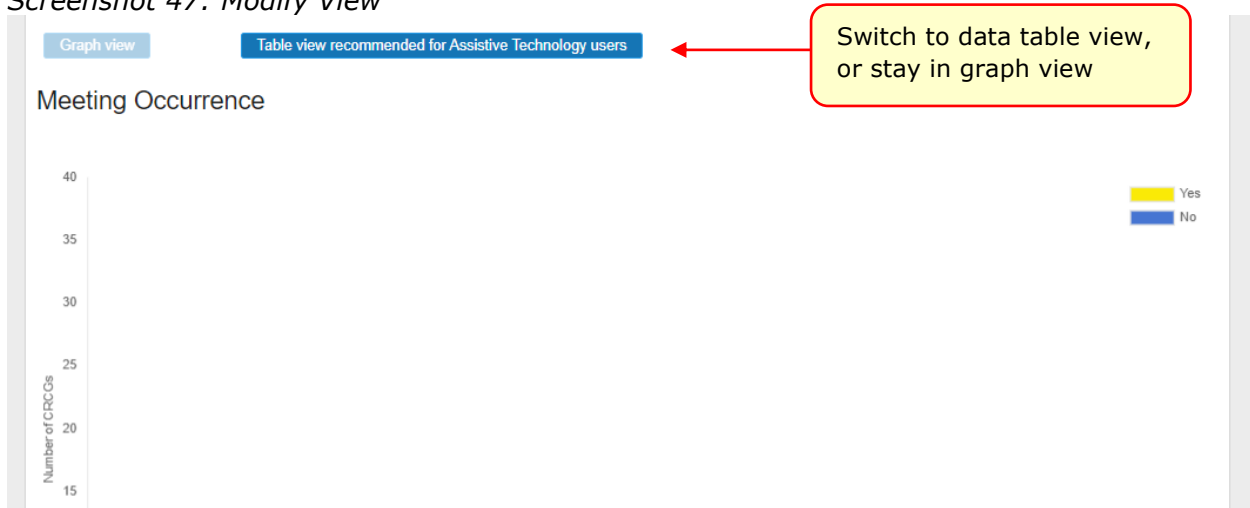
You can view all eight sections of the report or jump to a specific section (see Screenshot 46).

*Screenshot 46: Select or Jump to Report Section*



The data are displayed in graph view by default. You can change to a data table view and back to graph view by clicking on the view buttons (see Screenshot 47).

*Screenshot 47: Modify View*



## Satisfaction Survey for Individuals and Supporters

The satisfaction survey is designed to capture the experience of those served by CRCGs, including their families and informal support systems (e.g. family, caregivers, sitters, peers, etc.). The information will be another piece of data in the statewide CRCG assessment process and is utilized to inform local and state efforts.

The satisfaction survey is located on the CRCG website's Home page and For Families page, in both online and paper formats. It is provided in English and Spanish, is anonymous and is accessible by smart phone, tablet, or computer, making it easy and quick to complete. The direct link to the survey can be found here: <https://www.surveymonkey.com/r/D7X6MDT> (English) and <https://www.surveymonkey.com/r/DJZLF8P> (Spanish).

CRCG leaders should inform individuals and their families of the survey, encourage them to complete it, and can include a link on the individual service plan provided to people at the end of each staffing. CRCGs can also give individuals and their families a paper survey to complete as an alternative. Think about what will work best in your process and community to obtain the most survey responses.

Individuals that choose to complete a paper survey can return it to their CRCG or mail it directly to the State CRCG Office (6330 E. Hwy 290, STE 300, Austin, TX 78723) if they want their responses to remain confidential and de-identified. If respondents return surveys to the CRCG, the CRCG is responsible for either entering responses into the online platform or mailing the survey to the State CRCG Office.

The State CRCG Office's goal is not only to ensure all data are captured in the data collection system by CRCG leaders, but also to provide all individuals served and their informal supports an opportunity to share their experiences.

The survey questions are listed below for reference, but people served by CRCGs should be directed to complete the online version or paper version.

### Survey Questions

1. I am a:

- ☐ Parent/caregiver                      ☐ Youth or young adult between 13 and 22 years old  
☐ Adult served by the CRCG   ☐ Other (please specify): \_\_\_\_\_

2. Overall, how would you rate your experience with your Community Resource Coordination Group (CRCG)?

- ☐ Very satisfied                                      ☐ Dissatisfied  
☐ Satisfied    ☐ Very dissatisfied  
☐ Neither satisfied nor dissatisfied

3. What did you like about the CRCG process?

4. What did you dislike about the CRCG process?

5. Prior to the CRCG meeting, did you feel prepared on what to expect during the meeting?

- |   |  |
|---|--|
| <input type="checkbox"/> Extremely prepared | <input type="checkbox"/> Not so prepared     |
| <input type="checkbox"/> Very prepared      | <input type="checkbox"/> Not prepared at all |
| <input type="checkbox"/> Somewhat prepared  |  |

6. How supportive were the CRCG leaders and members?

- |  |                                      |
|--|--------------------------------------|
| <input type="checkbox"/> A great deal      | <input type="checkbox"/> A little    |
| <input type="checkbox"/> A lot             | <input type="checkbox"/> None at all |
| <input type="checkbox"/> A moderate amount |                                      |

7. Did the CRCG provide a plan and clear next steps for connecting to recommended services and supports?

- |                                   |  |
|-----------------------------------|--|
| <input type="checkbox"/> Yes      | <input type="checkbox"/> No                            |
| <input type="checkbox"/> Somewhat | <input type="checkbox"/> Other (please specify): _____ |

8. Did the CRCG meet your needs?

- |                               |                                |
|-------------------------------|--------------------------------|
| <input type="checkbox"/> All  | <input type="checkbox"/> A few |
| <input type="checkbox"/> Most | <input type="checkbox"/> None  |
| <input type="checkbox"/> Some |                                |

9. Were you told who to reach out to if you had questions about your plan or service recommendations, and provided contact information for that person?

- |                              |                             |
|------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
|------------------------------|-----------------------------|

10. Is there anything else you would like to share about your CRCG experience?

## Frequently Asked Questions

### Problems with access:

- How do I access the data collection system?
  - CRCG data reporters will receive an automated email each month with a unique link to access the CRCG data collection system. Click on the link to access the CRCG data collection system home page. Please note that the unique link will expire at the end of each month, therefore users will need to ensure that they are looking at the current month's email to access the system.
- What if I didn't receive an email to access the data collection system?
  - It is possible that your junk mail filter settings are blocking your incoming email messages. Make sure that [DoNotReply-CRCG@hhsc.state.tx.us](mailto:DoNotReply-CRCG@hhsc.state.tx.us) is marked as safe in your email account settings so that you always receive these emails in your inbox.
- Can more than one person receive access to the data collection system?
  - The data system only allows for one user, the CRCG data reporter, to access the CRCG data collection system from the unique link provided in their email inbox. If the data reporter for your CRCG has changed, please contact the State CRCG Office.
- Who do I contact for help?
  - Contact the State CRCG Office at 512-206-5255 or email [CRCG@hhsc.state.tx.us](mailto:CRCG@hhsc.state.tx.us).

### Entering and submitting CRCG staffing data:

- I am the data reporter for multiple CRCGs, how do I enter data for each CRCG?
  - If you are a data reporter for multiple CRCGs, you will receive one email with one unique link. When you click on the link, you will be redirected to the CRCG data collection system where you will select the specific CRCG office that you want to enter data for in the "Select CRCG" drop-down menu of the Data Entry page.
- How long do I have to enter or edit data in the system?
  - Data can be entered at any time and edited for 12 months from the current reporting month. The Add, In Progress, or Edit buttons on the Data Summary page indicate whether you are able to enter and/or edit data. After 12 months, the Review button is displayed and indicates data cannot be edited for that month.
- What's the difference between a first time staffing and follow up staffing?
  - First time staffing information is for an individual who is coming to the CRCG for the first time and an individual service plan is created. A follow up staffing will happen with an individual who has previously attended a staffing and the staffing focus may be an update or revision to the individualized service plan.
- How do I enter data after the month is over?
  - Information can be entered at any time after the month is over. Find the month and year you want to enter data for on the Data Entry

Summary page and click the Add button. If you need to go back to the prior year, go to the Select Reporting Year at the top of the Data Entry Summary page and choose from the drop-down menu.

- It is important that information be entered for the month in which the events occurred, not the month when you physically enter the data. For example, data have not been entered for staffing activities that occurred in September, October, and November, but it is now December. The data for those three months would be entered for the months during which the activity occurred, not for December.
- What do I do if I get stuck and cannot move forward in entering data?
  - First, make sure all items with an asterisk (\*) have been answered.
  - Secondly, there are options to choose Other as a response. When you select Other, you are required to enter additional information in order to move forward or submit data.
  - If you get stuck on either the First Time or Follow Up Staffing pages, check to make sure you entered the number of staffings for each county (if your CRCG serves more than one county), even if that number is zero.
- I entered data, but the Data Summary page is showing I need to add data, what happened?
  - It is important to click SAVE if you need to step away while entering data or else the system will time out and erase what was entered. You can save a page or multiple pages without submitting the data. If you save the page(s) without clicking the Submit button on the General Questions page, the summary page will show the action button as In Progress.

Once you are done entering data and are ready to submit, click Submit on the last page. After you hit Submit, the summary page will either show the Edit or Review button next to the month. The summary page will show Edit if your data have been entered and submitted within 12 months from the current reporting month. The summary page will show Review if data have been entered and submitted for the month, but data can no longer be changed as the month entered is over 12 months from the current reporting month.

### **Data collected in the data system:**

- What does the system collect?
  - The system collects aggregated, or combined, data for each month.
  - The questions in the system focus on meeting and staffing information.
- What do we do if we don't meet every month?
  - It is important that CRCGs go into the system and report on whether their CRCG met each month. If your CRCG did not meet, you will simply indicate this on the Meeting Information data entry screen and then click Submit.
- What do we report if we meet with CRCG members but don't staff or follow up on any cases?



- On the Meeting Information data entry screen, you will indicate that your CRCG met for the month, the purpose for the meeting (such as presentation, training, or general information sharing or other), and identify the representatives who were in attendance.

### **Features and questions inside the system:**

- Why don't I see the name(s) of my county(ies) in the drop-down menu when I choose a CRCG to report on?
  - Due to the requirements of the data system, the State CRCG Office created short codes for each CRCG. The codes consist of the letters "CRCG" followed by up to three numbers (e.g. CRCG112). These codes are meaningless to the CRCGs. Once you select the code listed in your drop-down menu, you will see the corresponding counties listed just below the menu.
  - If you report for more than one CRCG, you will have multiple choices available. Check the counties when you select a CRCG to be sure you are reporting for the right one.
  - If your counties are not listed properly, contact the State CRCG Office.
- What do I need to enter if I report that non-profit groups or ISDs participated in the meeting?
  - On the blank lines that appear when you select non-profit or ISD representation at your meetings, list all organizations that were present and separate them with commas (e.g. Alpha ISD, Bravo ISD, Charlie ISD).

### **Tools:**

- How do I get the tools created by the state office?
  - The tools are available on the home page of the data system once you log in. The tools are also available upon request by contacting the State CRCG Office.
- How do we collect the demographic information related to staffed cases?
  - You can gather the demographic information of the people served by the CRCG through any method you have available (e.g. intake forms, referral forms). If you don't have an existing method to collect this information, you can use the CRCG Demographic Staffing Information Form (see Appendix B) provided by the State CRCG Office to gather the exact information needed for reporting in the data system. You can collect demographic information at any point in your process. Do what works best for you.

### **Satisfaction Survey:**

- Who completes the satisfaction survey?
  - The survey is for use by members of the community who received services from your CRCG. This can include the direct client, their caregiver/family members, or other natural supports who were involved with the CRCG interactions.
- Where can we find the survey and what is our role?

- The survey is offered online and is available at the state CRCG website on the Home page and For Families page. This is the direct link to the survey: <https://www.surveymonkey.com/r/D7X6MDT> (English) and <https://www.surveymonkey.com/r/DJZLF8P> (Spanish). CRCGs can help increase the number of people who complete the survey by sharing the link through their ISPs, recommendation lists, or other communications with individuals and their families/supports.
- The survey is also available by paper form. Contact the State CRCG Office if you need a copy or find it on the CRCG website.
- Individuals that choose to complete the paper form can return it to their CRCG or mail it directly to the State CRCG Office if they want their responses to remain confidential and de-identified.
- The data reporter will be responsible for entering any paper survey responses received into the online platform. This will allow State CRCG Office to review survey responses.

## Conclusion

This User Guide is intended to be a simple, easy to use guide for local CRCGs to collect and report important data. The data collected in the CRCG system can be used by local CRCGs to do the following:

- Determine individual, family, and community satisfaction with the CRCG process
- Identify barriers and assess community needs
- Identify priorities for training, education, and public awareness
- Improve processes, clarify communication, and enhance cultural competence
- Find out what participants benefit most from the process
- Mobilize community support and broaden consensus among partners
- Determine the effects of the CRCG process
- Document accomplishments and gather success stories
- Promote and market their CRCG to leaders
- Seek additional resources from various source, including grants from foundations and corporations

The State CRCG Office can utilize the data to target technical assistance and training, identify and create tools, and assist local CRCGs in their efforts to make a difference in the lives of Texans with complex needs. The biennial legislative report for the Texas Legislature includes data related to the following items:

- Number of people served through the Community Resource Coordination Groups (CRCGs)
- Information on outcomes provided
- Description of any barriers identified to the state's ability to provide effective services to persons needing multiagency services
- Any other information relevant to improving the delivery of services and supports to persons needing multiagency support.

Please reach out to the State CRCG Office at any time for more information.

## Appendix A: Data Tracking Worksheet

This data tracking worksheet is an easy way to tally and total the activities and people served during CRCG meetings and staffings. You can use this worksheet to organize your data. The worksheet follows the sequence of screens in the online data collection system and helps you tally and total aggregate information for the month. If you use this worksheet as an aid to compile data as you move through the month, you will substantially reduce the time needed to prepare the information for data entry. Just mark the worksheet during or after each meeting/staffing and you will be ready to enter information in the data collection system at the end of each month. Required questions are marked with an asterisk. You can modify this worksheet to create more space for writing on a hard copy or prefill certain fields. You can also type directly into the worksheet using Word. The Word version of this worksheet is available for download in the data collection system. An example of one section of a completed worksheet is shown below.

### Example Section of Data Tracking Worksheet

#### Staffings

Track number of staffings per county, types of staffings, and individual/family attendance.

| <b>* Number of staffings per individual's county of residence:</b>         |       | <b>First Time Staffing</b> |              | <b>Follow Up Staffing</b> |              |
|--|-------|----------------------------|--------------|---------------------------|--------------|
|  |       | <b>Tally</b>               | <b>Total</b> | <b>Tally</b>              | <b>Total</b> |
| County Name  | Alpha |                            | 2            |                           | 1            |
|  | Bravo |                            | 1            |                           | 0            |
|  |       |                            |              |                           |              |
|  |       |                            |              |                           |              |
|  |       |                            |              |                           |              |
|  |       |                            |              |                           |              |
|  |       |                            |              |                           |              |
| * Of the total number of staffings, how many were reintegration staffings? |       |                            | 0            |                           | 1            |
| * Of the total number of staffings, how many were emergency staffings?     |       |                            | 0            |                           | 0            |
| * For how many staffings this month was the individual/family present?     |       |                            | 3            |                           | 1            |

## Appendix B: CRCG Demographic Staffing Information Form

The CRCG Demographic Staffing Information Form is provided as a tool to collect demographic data for the individuals who were staffed at the CRCG. The form captures the person's age, ethnicity, race, gender, and primary language. If you use this form as an aid to compile data as you move through the month, you will substantially reduce the time needed to prepare the information for data entry. Just mark the worksheet during or after each staffing and you will be ready to enter information in the data collection system at the end of each month. You can also type directly into the worksheet using Word. The Word version of this worksheet is available for download in the data collection system. An example of one section of the worksheet is shown below.

### CRCG DEMOGRAPHIC STAFFING INFORMATION

Each individual that has a staffing (whether they attend or not) should answer the following questions. Information provided is entered into the CRCG data collection system by the CRCG's assigned data reporter.

#### Person Referred to CRCG

What is your age? \_\_\_\_\_

What is your ethnicity? Choose one option.

☐Hispanic    ☐Not Hispanic

What is your race? Choose one option.

|  |  |
|--|--|
| <input type="checkbox"/> White                     | <input type="checkbox"/> American Indian or Alaska Native          |
| <input type="checkbox"/> Black or African American | <input type="checkbox"/> Middle Eastern or North African           |
| <input type="checkbox"/> Asian                     | <input type="checkbox"/> Native Hawaiian or Other Pacific Islander |
| <input type="checkbox"/> Other _____               |  |

Select your gender:

☐Male    ☐Female    ☐Additional Gender Category: \_\_\_\_\_  
☐Prefer not to answer

What is your primary language?

☐English    ☐Spanish    ☐Vietnamese  
☐Chinese    ☐Tagalog    ☐Other \_\_\_\_\_

## Appendix C: Data System Quick Guide

Instructions: Use this guide to quickly move through the data collection system each month. For best results, compile your staffing/meeting data on the tracking worksheet before you enter data in the system.

### Accessing the CRCG Data Collection System

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1. CRCG data reporters will receive an automated email each month with a unique link. The email will be sent from [DoNotReply-CRCG@hhsc.state.tx.us](mailto:DoNotReply-CRCG@hhsc.state.tx.us). Users will click on the unique link to be directed to the CRCG Data Collection System home page.

### Data Collection System Home Page

---

1. Once on the home page of the CRCG Data Collection System, click the Data Entry button in the center of the page or click on the Data Entry tab in the toolbar

### Data Summary Page

---

1. Select the year and CRCG for which you want to enter data
2. Click on a month for data entry

### Meeting Information

---

1. Verify the correct month/year and CRCG before starting data entry
2. Indicate whether the CRCG met for the month
  - If the CRCG did not met, click No and then click Submit
  - If the CRCG met, click Yes and provided additional information about the meetings/staffings:
    - Select the purpose(s) of the meeting
    - Mark all agencies/programs that attended meetings/staffings during the month
    - Click Save & Next to save and continue (click Cancel to delete all information entered)

### Staffing Information: First Time Staffings

---

1. Click the box if you have first time staffings to report
  - If you do not have first time staffings to report, leave the whole page blank and click Save & Next to proceed to the next screen
2. Enter the number of first time staffings for each county and answer the remaining questions in this section (enter zeros for counties with no staffings)
3. Complete the demographic information for each individual who had first time staffings and click Add (repeat as needed)

4. Report each strength expressed during first time staffing meetings, enter the number of times the strength was identified in meetings during the month, and click Add (repeat as needed)
5. Report each concern/need expressed during first time staffing meetings, enter the number of times the concern/need was identified in meetings during the month, and click Add (repeat as needed)
6. Report each service/support recommended in individual service plans during first time staffing meetings, enter the number of times the service/support was identified during the month, and click Add (repeat as needed)
  - If you selected Placement or 1915(c) Waivers (MDCP, YES, HCS, CLASS, DBMD, TXHmL) as services recommended during meetings, provide additional details about those recommendations when the system prompts you in the next section
7. Click Save & Next to save and continue

### Staffing Information: Follow Up Staffings

---

1. Click the box if you have follow up staffings to report
  - If you do not have follow up staffings to report, leave the whole page blank and click Save & next to proceed to the next screen
2. Repeat steps 2-7 from first time staffings section above

### General Questions

---

1. Answer the staffing detail questions at the top of the screen
2. Enter the number of people who returned from out of home placements during this month
3. Enter the number of times barriers were identified this month in each of the following categories and provide additional information if requested
  - Physical barriers
  - Service availability barriers
  - Agency barriers
  - Client choice to not access services
4. Provide additional information for your CRCG's records
5. Click Submit when complete or go back to previous pages to make changes

### Data Summary Page

---

1. Verify that your submission has been recorded, this will be indicated by a blue Edit button, or is in progress if you did not finish, which is indicated by a white In Progress button.
2. Choose another month if you want to enter data for another period
3. Click Close in the top right corner of the page when you are done or simply exit out of your browser

### Making Reports

---

1. Click on the Reports tab on the home page of the data collection system

2. Choose the starting and ending month for the period for which you want a report
3. Select a CRCG or statewide data
4. Use the hyperlinks to select the portion of the report you want to view
5. Use the buttons at the top of the report to switch between graphs and data table



## Appendix D: Account Troubleshooting

### Access and Data Entry Issues

If you have any issues with accessing the CRCG data system, entering CRCG data, or running CRCG data reports, please contact the State CRCG Office.

State CRCG Office

512-206-5255

[CRCG@hhsc.state.tx.us](mailto:CRCG@hhsc.state.tx.us)

## Appendix E: State Agency Partners

These eight state agencies developed and adopted the memorandum of understanding (MOU) for coordinated services to persons needing multiagency services in Texas.

**Texas Department of Criminal Justice (TDCJ) Mission:** "To provide public safety, promote positive change in offender behavior, reintegrate offenders into society, and assist victims of crime."

**Texas Correctional Office of Offenders with Medical or Mental Impairments (TCOOMMI) Mission:** "To provide a formal structure of criminal justice, health and human service and other affected organizations to communicate and coordinate on policy, legislative and programmatic issues affecting offenders with special needs (Serious, chronic, and pervasive mental illnesses, intellectual disability, terminal and serious medical conditions, physical disabilities and those who are elderly)."

**Texas Department of Family and Protective Services (DFPS) Mission:** "We promote safe and healthy families and protect children and vulnerable adults from abuse, neglect, and exploitation."

**Texas Department of Housing and Community Affairs (TDHCA) Mission:** "To administer its assigned programs efficiently, transparently, and lawfully and to invest its resources strategically and develop high quality affordable housing which allows Texas communities to thrive."

**Texas Department of State Health Services (DSHS) Mission:** "To improve the health, safety, and well-being of Texans through good stewardship of public resources, and a focus on core public health functions."

**Texas Education Agency (TEA) Vision:** "Works to improve outcomes for all public school students in the state by providing leadership, guidance, and support to school systems, working towards the vision that every child in Texas is an independent thinker and graduates prepared for success in college, a career, or in the military as an engaged, productive citizen."

**Texas Health and Human Services Commission (HHSC) Mission:** "Improving the health, safety, and well-being of Texans with good stewardship of public resources."

**Texas Juvenile Justice Department (TJJD) Mission:** "Transforming young lives and creating safer communities."

**Texas Workforce Commission (TWC) Mission:** "To promote and support a workforce system that creates value and offers employers, individuals and communities the opportunity to achieve and sustain economic prosperity."